



Performance Budgeting

Project Q8 PMP Report

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Commonwealth of Virginia
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1 Introduction

1.1 Purpose

The purpose of this document is to review the Performance Budgeting (PB) Project Management Plan (PMP) and each of its component documents, as well as to identify activities that occurred during Quarter 8, April 1, 2011 and June 30, 2011, of the project.

Now that the PB Configuration Management Plan is approved, this document will include all of the changes made to Non-Project Management Plan Document Control Items as identified in the PB Configuration Management Plan since each Control Item was approved by COVA and baselined.

1.2 Organization

This document is intended as a summary for the Commonwealth of Virginia (COVA) Project Manager. It is organized into a section for each document with the following subsections in each:

- Activities Related to the Plan
- Content Changes to the Plan

2 PB Project Management Plan

2.1 Activities Related to the Plan

- Specific activities related to the PB Project Management Plan are included in the supporting plan summaries in this document.

2.2 Content Changes to the Plan

- Phase 2/3 and Change Request Planning is finalized. Changes were made to Section D, Item 6, the Critical Milestone Summary. This summary was updated to reflect the major milestones and dates.

3 PB Project Budget Plan

3.1 Activities Related to the Plan

The following deliverables were accepted by COVA during Q8:

- PB Project Q7 PMP Report.
- PB Project Q7 Summary Report.
- Strategic Planning Functional Design Document Update/Extension.
- Test Plan for Phase 2 and Update/Extension.
- Training Plan Phase 2 and Update/Extension.
- Strategic Planning Requirement Traceability Matrix Update/Extension.
- Agency Spend Plan Test.
- Strategic Planning Test Scripts and Update/Extension.
- PB Reporting CR April.
- PB Reporting CR May.
- PB Management Environment April.
- Warranty Period for Phase 1 – April.
- PB Schedule Delay.
- Entered monthly project status reports into ProSight.

3.2 Content Changes to the Plan

- Phase 2/3 and Change Request Planning is finalized. Changes were made to Section D, Schedule. This schedule was updated to reflect the major milestones and dates.

4 PB Project Communication Plan

4.1 Activities Related to the Plan

- Steering Committee presentations.
- PB Project Management Team meeting presentations.
- Agency Spend Plan and Strategic Planning UAT Out-Reach Meeting and Webinars.
- Release 1.5, 1.6
- Meeting minutes for Steering Committee and PB Project Management Team created and distributed.
- Action item logs for Steering Committee and PB Project Management Team created.
- PB Project Repository updated regularly.
- Risk, Issue, and Change Management logs updated regularly.
- Entered monthly project status reports into ProSight.

4.2 Content Changes to the Plan

- None since COVA approval.

5 PB Project Performance Management Plan

5.1 Activities Related to the Plan

- None since COVA approval.

5.2 Content Changes to the Plan

- None since COVA approval.

6 PB Project Procurement Plan

6.1 Activities Related to the Plan

- Procured office supplies.
- UAT Coordinator was on-boarded.

6.2 Content Changes to the Plan

- Phase 2/3 and Change Request Planning is finalized. Additions were made to Section B, the Procurement Summary Chart.

7 PB Project Quality Plan

7.1 Activities Related to the Plan

- Created PB Project Q8 PMP and Q8 Quarterly Summary Report.
- Produced Biweekly Status Reports and presented in PB Project Management Team meetings.
- Conducted inspections (i.e., peer reviews and tech edit) of each deliverable prior to delivery to the client.
- Agency Spend Plan and Strategic Planning UAT Out-Reach Meeting and Webinars.
- Action items created and assigned.
- Meeting minutes created and available on the PB Project Repository.

7.2 Content Changes to the Plan

- None since COVA approval.

8 PB Project Resource Management Plan

8.1 Activities Related to the Plan

- New tester joined the team, Krithika Ravishankar, as Strategic Planning testing support.
- New tester joined the team, Priya Kulachari, as Agency Spend Plan testing support.
- UAT Coordinator, Kiran Chiluvuri, joined the COVA Team.
- Project Controls Lead, Lee Hodges, rolled-off the project.
- .Net/BIDS Developer, Jesse Douglas, rolled-off the project.
- Training/Documentation Lead, Mary Stanley, rolled-off the project.
- .Net/Logi Developer, Meghan Laskowski, rolled-off the project.

8.2 Content Changes to the Plan

- Phase 2/3 and Change Request Planning is finalized. Changes were made to Section D; the Organizational Breakdown Structure was added to reflect Phase 2/3 staffing. Changes were made to Section F to reflect staff assignments for Phase 2/3. Changes were made to Section G to reflect the percentage of time allocation per month for each resource on Phase 2/3.

9 PB Project Risk and Issue Management Plan

9.1 Activities Related to the Plan

- Re-ranked the project risks based on ongoing changes to the project.
- Presented updated risks to Steering Committee and PB Project Management Team.

9.2 Content Changes to the Plan

- None since COVA approval.

10 PB Project Schedule Management Plan

10.1 Activities Related to the Plan

- Schedule progress and deliverables discussed in weekly internal PPC team meetings.
- Schedule progress and deliverables shared with PB Project Management Team during Biweekly Team Meetings.
- Schedule progress and deliverables shared with the PB Project Steering Committee.

10.2 Content Changes to the Plan

- None since COVA approval.

11 PB Project Scope and Change Management Plan

11.1 Activities Related to the Plan

- Change Requests to affect the PB System created and under review

11.2 Content Changes to the Plan

- None since COVA approval.

12 PB Fit/Gap Plan Phase 1

12.1 Activities Related to the Plan

- None during this quarterly review.

12.2 Content Changes to the Plan

- None since COVA approval

13 Requirements Traceability Matrix and Requirements Traceability Matrix for Design for Phase 1

13.1 Activities Related to the Plan

- None during this quarterly review.

13.2 Content Changes to the Plan

- None since COVA approval.

14 PB Data Conversion and Migration Plan

14.1 Activities Related to the Plan

- None during this quarterly review.

14.2 Content Changes to the Plan

- None since COVA approval

15 Preliminary and Final PB Data Conversion and Migration Design

15.1 Activities Related to the Plan

- None during this quarterly review.

15.2 Content Changes to the Plan

- None since Q3 COVA review and approval

16 PB Coding Structure and Data Standards Document

16.1 Activities Related to the Plan

- None during this quarterly review.

16.2 Content Changes to the Plan

- None since Q3 COVA review and approval.

17 PB Abbreviations and Glossary

17.1 Activities Related to the Plan

- Utilized the abbreviations used for coding and project management documents for the Performance Budgeting (“PB”) Project.

17.2 Content Changes to the Plan

- None since COVA review (this was not a billable deliverable).

18 Preliminary and Final PB External System Interfaces Design Document

18.1 Activities Related to the Plan

- Refined the technical design whereby data from external systems is brought into the new PB System. Identified the data needs of the new PB System vis-à-vis the external systems, the technologies employed, the databases required to support interface operations (to include data models), the logical system architecture, the physical system architecture, the service designs, and the process flow.

18.2 Content Changes to the Plan

- No changes since last quarterly review

19 Preliminary and Final PB Application Design Document and Addendum

19.1 Activities Related to the Plan

- Worked on the design for the remainder of the Phase I functionality.

19.2 Content Changes to the Plan

- None since initial approval.

20 Preliminary and Final PB Report Design and Specifications Document

20.1 Activities Related to the Plan

- Refined the design and specifications of the reports that were produced as part of Phase I; also worked on CRs.

20.2 Content Changes to the Plan

- None since Q3 COVA review and approval

21 PB Database Design Document

21.1 Activities Related to the Plan

- None during this quarterly review.

21.2 Content Changes to the Plan

- None since Q5 approval.

22 PB Security Plan

22.1 Activities Related to the Plan

- None during this quarterly review.

22.2 Content Changes to the Plan

- None Since Q3 COVA Review and approval.

23 PB Organizational Change Management Plan

23.1 Activities Related to the Plan

- None during this quarterly review.

23.2 Content Changes to the Plan

- None since COVA approval.

24 PB Integrated Training Plan Phase 1

24.1 Activities Related to the Plan

- None since Phase 1 Go-Live.

24.2 Content Changes to the Plan

- A separate document for Phase 2 has been created and is referenced later in this document.

25 PB Test Plan for Phase 1

25.1 Activities Related to the Plan

- None this quarterly review period.

25.2 Content Changes to the Plan

- A separate document for Phase 2 has been created and is referenced later in this document.

26 PB Data Conversion and Migration SSIS Packages Document

26.1 Activities Related to the Plan

- None during this quarterly review.

26.2 Content Changes to the Plan

- None Since Q3 COVA Review and approval.

27 PB Performance and Capacity Planning Approach Document

27.1 Activities Related to the Plan

- Performed the approach for performance testing and capacity planning that is both systematic and practical.

27.2 Content Changes to the Plan

- None since COVA approval.

28 PB Configuration Management Plan

28.1 Activities Related to the Plan

- Performed the definition and controls for the PB System configuration items (CI). Listed all existing CIs for the project, how they are managed, and the process for adding a new item.

28.2 Content Changes to the Plan

- None since COVA approval.

29 PB Performance Test Plan

29.1 Activities Related to the Plan

- When the new Performance Budgeting System (PB System) goes live, it will be the central budgeting application for the Department of Planning and Budget (DPB) and several agencies. It is expected that different user populations, performing different specialized budget tasks, will make use of the PB System throughout the fiscal year and that usage spikes will occur just before task completion cutoff dates. Some of these tasks will be CPU, memory, and database intensive.

This document discusses the performance test plan, giving a high-level description of the following facets:

1. The performance criteria as specified in the project requirements.
2. The Team Foundation Server (TFS) Test Load Agent 2008 test tool and test rig architecture.
3. The test plan, which includes a discussion of the environments, schedule, and test methodology.

Performance Testing is still underway.

29.2 Content Changes to the Plan

- None since Q5 approval

30 PB Help Desk Plan

30.1 Activities Related to the Plan

- The Performance Budgeting (PB) Help Desk Plan defines the services and activities required to coordinate and to respond to Problems and Service Requests made by the PB End-Users and Commonwealth of Virginia (COVA) technical staff. Since we have achieved Phase 1 Go-Live, Help Desk activities are underway.

30.2 Content Changes to the Plan

- None since COVA approval.

31 PB User Documentation and Training for Phase 1

31.1 Activities Related to the Plan

-

31.2 Content Changes to the Plan

- DPB Continues there review of User Documentation.

32 PB Release Management Plan

32.1 Activities Related to the Plan

- Numerous releases have gone into Production since Go-Live.

32.2 Content Changes to the Plan

- None since COVA approval, but expecting comments from COVA Project Manager on this document

33 PB Disaster Recovery Plan

33.1 Activities Related to the Plan

- None since COVA approval.

33.2 Content Changes to the Plan

- None since COVA approval.

34 Strategic Planning Requirements Traceability Matrix

34.1 Activities Related to the Plan

- Identified Requirements related to Strategic Planning.

34.2 Content Changes to the Plan

- Incorporated CRs into the approved RTM and resubmitted for sign-off.

35 Agency Spend Plan Requirements Traceability Matrix and Extention

35.1 Activities Related to the Plan

- Identified Requirements related to Agency Spend Plan.

35.2 Content Changes to the Plan

- Incorporated CRs into the approved RTM and resubmitted for sign-off.

36 PB Strategic Planning Functional Design Document and Extention

36.1 Activities Related to the Plan

- Identified Requirements related to Strategic Planning.

36.2 Content Changes to the Plan

- Incorporated CRs into the approved Functional Design and resubmitted for sign-off.

37 PB Agency Spend Plan Functional Design Document and Extention

37.1 Activities Related to the Plan

- Identified Requirements related to Agency Spend Plan.

37.2 Content Changes to the Plan

- Incorporated CRs into the approved Functional Design and resubmitted for sign-off.

38 PB Disaster Recovery Plan

38.1 Activities Related to the Plan

- The Disaster Recovery (DR) environment is a mirror of the Performance Budgeting Production environment. It will host the same version of the PB System as the Production environment and maintain an up-to-date copy of its data. Should the Production environment become inoperable, the Disaster Recovery environment will be activated and traffic redirected to it at the discretion of the PB Project/Program Management Team. No activities were enacted since approval of this plan.

38.2 Content Changes to the Plan

- None since COVA approval. However, the COVA Technical Resource is obligated to make changes to this document to finalize it.

39 Stress Test Results

39.1 Activities Related to the Plan

- Conducted Performance Testing.

39.2 Content Changes to the Plan

- None since COVA approval.

40 PB Test Plan for Phase 2 and Extention

40.1 Activities Related to the Plan

- Performed testing for the Agency Spend Plan, Strategic Planning, and CRs.

40.2 Content Changes to the Plan

- None since COVA approval.

41 PB Training Plan for Phase 2 and Extention

41.1 Activities Related to the Plan

- Performed testing for the Agency Spend Plan, Strategic Planning, and CRs.
- Agency Spend Plan, Strategic Planning and related CRs put on hold.

41.2 Content Changes to the Plan

- None since COVA approval.

42 PB Strategic Planning Technical Design Document

42.1 Activities Related to the Plan

- Started Strategic Planning module for PB.

42.2 Content Changes to the Plan

- None since COVA approval.

43 PB Agency Spend Plan Technical Design Document and Extention

43.1 Activities Related to the Plan

- Developed Agency Spend Plan module for PB.
- Conducted first round of UAT.

43.2 Content Changes to the Plan

- None since COVA approval.

44 Strategic Planning Test Scripts

44.1 Activities Related to the Plan

- Began testing for the Strategic Planning and CRs.

44.2 Content Changes to the Plan

- None since COVA approval.

45 Strategic Planning System Test Results

45.1 Activities Related to the Plan

- Began testing for the Strategic Planning and CRs.

45.2 Content Changes to the Plan

- None since COVA approval.

46 Agency Spend Plan Test Scripts and Extention

46.1 Activities Related to the Plan

- Performed testing for the Agency Spend Plan and CRs.

46.2 Content Changes to the Plan

- None since COVA approval.

47 Agency Spend Plan System Test Results

47.1 Activities Related to the Plan

- Performed testing for the Agency Spend Plan and CRs.

47.2 Content Changes to the Plan

- None since COVA approval.

48 Strategic Planning Help Delivery and Extention

48.1 Activities Related to the Plan

- Began Help and Training efforts.

48.2 Content Changes to the Plan

- None since COVA approval.

49 Agency Spend Plan Help Delivery and Extention

49.1 Activities Related to the Plan

- Finalized Help and Training efforts.

49.2 Content Changes to the Plan

- None since COVA approval.

50 Strategic Planning UAT Guidance

50.1 Activities Related to the Plan

- Conducted session for UAT approach and testing methods.

50.2 Content Changes to the Plan

- None since COVA approval.

51 Agency Spend Plan UAT Guidance

51.1 Activities Related to the Plan

- Conducted session for UAT approach and testing methods.

51.2 Content Changes to the Plan

- None since COVA approval.

52 Strategic Planning Training

52.1 Activities Related to the Plan

- Began and continued building training materials.

52.2 Content Changes to the Plan

- None since COVA approval.

53 Agency Spend Plan Training

53.1 Activities Related to the Plan

- Completed training materials and had some review sessions.

53.2 Content Changes to the Plan

- None since COVA approval.

54 BIDS Upgrade Documentation

54.1 Activities Related to the Plan

- None.

54.2 Content Changes to the Plan

- None since COVA approval.

55 Systems Operations Manual

55.1 Activities Related to the Plan

- None.

55.2 Content Changes to the Plan

- None since COVA approval.

56 PB Transition Plan

56.1 Activities Related to the Plan

- None.

56.2 Content Changes to the Plan

- None since COVA approval.